Enter Menu Details

1. If the information prompt is no longer visible, click the

Display Menus button , located on the right-hand side of the Sub-Event display.

- 2. On the menu selection window, click a menu title and select, from the right-hand side of the screen, the items you would like to add.
- 3. Add a custom menu item to an event by clicking the Add A

New Food/Service Item button , located on the righthand side of the **Food/Service** tab.

 Enter the name, price, and quantity of the menu item. (Ensure the item type, located on the far right-hand side of the window, is correct).

See <u>Tip of the Week-Choosing Menus.</u>

Generate the Contract (or Other Print)

- 1. From the open event in Event Manager, click the down arrow on the **Prints** button, located at the top of the screen.
- 2. Click Event Contracts and Invoices and choose Contract (or other desired print).
- 3. From the Print Preview screen, click the **Print** button, located on the upper left-hand side of the screen.

E-mail the Contract (or Other Print)

- From the Print Preview screen, click the Email button, located at the top of the screen.
 Note: The print will be attached as a PDF.
- 2. Type a subject into the <u>Subject</u> field or select an option from the quickpick list at the right of the field.
- Type the e-mail body or select a custom merge letter by clicking the Merge Doc button (available with the Marketing Tools add-in).
- 4. Attach additional prints/files as desired.
- 5. Click the **Send** button.

See <u>Tip of the Week-Emailing the Contract.</u>

Additional Resources

Caterease Orientation Presentation Booking Your First Event User Guide Booking Your First Event Video Program Setup Quick Reference Guide Menu Manager Quick Reference Guide Print Designer Quick Reference Guide



a product of Horizon Business Services, Inc. Naples, FL 34102 T: 239.261.6617 F: 239.261.0067 www.caterease.com help@caterease.com

caterease catering & event management software

Quick Reference Guide:

Booking Your First Event



800.863.1616 www.caterease.com

Access the Event Wizard

1. Click the **Events Wizard** button , located in the Quick Access Toolbar at the top left-hand side of your screen. **Note:** The Event Wizard can be accessed from many areas within Caterease. If you are in the Scheduler (**Main** > **Scheduler**), select a date on the calendar, right-click, and choose **New Event**.

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Add a New Account/Contact Person (Step 1)

- 1. Click the Add New Account button _____, located at the top of the Event Wizard (Step 1) window.
- Click Yes at the confirmation prompt. Note: The confirmation prompt may not appear if disabled in Global Settings.
- 3. Fill in the Client/Company details by typing directly into the fields provided (see image below).
- 4. When finished, click **OK**. **Note:** If you are adding information for an individual, click the

Add a New Contact button, and then click Copy to Client on the subsequent screen.

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Choose a Wizard Layout

1. From Step 1 of the Event Wizard, click the down arrow to the right of **Next** and select the desired layout.

Note: Four layouts are deployed with your Caterease program.

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	Client 🔺	City	St/Prov	Telephone	<u>.</u>
	Microage	Ft. Myers	FL	(612) 551-	1100
	 Microtech Hearing Inst. 	Ft. Myers	FL	(612) 934-3001	3001
MSUS/PALS N A C M Naples City Police Department		Ft. Myers	FL	(507) 389-5784	5784
		Ft. Myers FL Naples FL		(612) 341-9621 (239) 777-1234	9621
					1234
	 Naples Dental Assoc. 	Naples	FL	(239) 888-	4321
	🗉 Natasha White	Naples	FL	(239) 896-	1295
	📧 North Naples Dart League	Naples	FL	(612) 827-	5588
	 Opportunity Workshop 	Ft. Myers	FL	(612) 930-	4278
		Naples	FL	(612) 559-	3333
	 Polaris Industries 	Naples	FL	(612) 829-	8214
	 Professional Development Institution 	ul Ft. Myers	FL	(612) 774-	5590
	 Robert Hamilton Company 	Ft. Myers	FL	(612) 544-	1234
	 Salassa/Lau Wedding Reception 	Ft. Myers	FL	(941) 555-	2938
	 Schad Associates 	Naples	FL	(612) 944-	2153
	 Smith, John 	Naples	FL	(239) 444-	8888 =
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	Solid Rock Church - Womens Re	t Naples	FL	(612) 427-	1296
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	 Sunset Technologies 	Naples	FL	(239) 261-	6617 🚽
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Customize a Wizard Layout

- 1. Right-click anywhere on the areas of the Wizard screen that do not allow data entry, and choose **Customize**.
- 2. To add a field to your screen, hold your left mouse button on any field in the **Available Items** pane and drag it into the desired location on your screen. To remove a field from the screen, click on a field (with the Customize window open) and drag it into the **Available Items** pane.
- 3. To remove an entire tab from the screen, right-click on a tab and choose Customize. Click on the tab heading (for example, click on the words "Venue Information" within the Venue tab). The entire section will become highlighted, enabling you to drag it into the Available Items pane.
- 4. Continue adding or removing fields or tabs as desired.

Important Note: Click the **Save Window Settings** button located at the top right-hand side of the window, if you want the layout to serve as the default.

See Creating Custom Event Wizards.

Complete the Informational Fields (Step 2)

Note: The entire screen can be customized to suit your preferences.

- 1. Enter details into simple text fields, such as the <u>Party</u> <u>Name</u> field, by simply typing into the field.
- 2. Click the down arrow to the right of various fields to access a list of quickpicks.
- 3. Enter a date by typing into the <u>Date</u> field or by accessing the drop-down calendar.
- 4. Enter times for the new event by typing directly into the

fields or by clicking the **Time Wizard** button and dragging and dropping times into position.

- [Optional—If Tabbed View is Selected] For on-premise parties, click the Venue tab and select a Setup Style and Banquet Room.
- 6. **[Optional—If Tabbed View is Selected]** For off-premise parties, click the **Site** tab and enter the site information, including Name, Address, etc., or click the **Select Site**

Location button to select from a list of frequently used locations.

- 7. Enter text into text blocks (Notes, Directions, Setup Notes, etc.), by typing directly into the fields.
- 8. When finished, click **OK**.
- 9. Click **Yes** at the prompt to move to the menu-selection process.

Step 2: Select Event Fields ★										
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